# Figuring Out The Follow-Up Caseload

#### Chart Out Your Real Numbers

 Develop a chart of case loads for each follow-up for the program year

Follow-up as early in each quarter as possible

_	Jul-Sep 2010 exits	Oct-Dec 2010 exits	Jan-Mar 2011 exits	Apr-Jun 2011 exits	Jul-Sep 2011 exits	Oct-Dec 2011 exits	Jan-Mar 2012 exits
Measure	0ct-Dec 2010	Jan-Mar 2011	April- June 2011	Jul-Sept 2011	Oct-Dec 2011	Jan-Mar 2012	April- June 2012
Entered Employment							
Retention @ 6 months Part 1							
Retention @ 6 months Part 2 Earnings Part 1							
Earnings Part 2; Retention @ 1 year							

#### Follow-up Strategies are the Key to Success

#### Timing & Quality of Follow-up

- What triggers follow-up?
- When do you do it?
- Who does it?
- Who do you follow-up with?
- What do you want to know?
- How will you elicit the information?
- Do you have any alternatives?
- What will you do with this information?

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#### When Does Follow-Up End?

#### Unable to confirm employment ....

- Failed entered employment measure?
  - No further follow-up
- Failed retention at 6 months measure?
  - No further follow-up
- Failed average earnings measure?
  - No further follow-up
- Completed retention at one year measure?
  - CASE CLOSED

### For all participants listed in the Entered Employment row, ask:

- WHEN: earliest-1<sup>st</sup> month following the exit quarter
- WHO: participant and supervisor
- WHAT: Participant ... still working? job satisfaction; any difficulties, training or support service needs.
   Supervisor ... satisfaction with placement; issues project can help resolve to ensure placement success; customer satisfaction survey ... Both: reminder of continuing contact
- HOW: on-site visit best; telephone with follow-up mailed survey
- <u>USE OF INFORMATION:</u> to job developer if no longer working; to case manager if support services needed

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### For all participants listed in the Retention rows, ask:

- WHEN: The first month of both the second and third quarters after the exit quarter
- WHO: participant and supervisor
- <u>WHAT:</u> Participant ... Are you still working? Did you earn any income this month? job satisfaction; any difficulties, training or support service needs. Supervisor ... satisfaction with placement; issues project can help resolve to ensure placement success; 2<sup>nd</sup> retention quarter wage data for 1<sup>st</sup> retention quarter ... Both: reminder of continuing contact
- HOW: Telephone; fax or email for wage data
- <u>USE OF INFORMATION</u>: to job developer if no longer working; to case manager if support services needed

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## For all participants achieving retention (earning income in both retention quarters) ask:

- WHEN: First month of the 2<sup>nd</sup> retention quarter and first month of the 4<sup>th</sup> quarter after the exit quarter
- WHO: Employer or participant
- WHAT: Earnings statement for the 2<sup>nd</sup> and 3<sup>rd</sup> quarters after the exit quarter
- HOW: Telephone with fax or email follow-up
- USE OF INFORMATION: Entry into data base

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#### Retention At One Year Follow-Up

- TRIGGER: All those who achieved retention for 6 months
- WHEN: the first month of the 4<sup>th</sup> quarter after the exit quarter
- WHO: Participant
- WHAT: Job satisfaction; any difficulties, training or support service needs
- HOW: Telephone
- <u>USE OF INFORMATION:</u> to job developer if no longer working